

Quick Guide for New Qualtrics Users



Steps to Get Started	How To
Login to Qualtrics & set a new password	<ul style="list-style-type: none"> - If it is your first time logging in, you will need to set a password. Use the email link from Qualtrics to create your new password. Your login is your full Macalester email address. - If it is not your first time logging in, go to www.qualtrics.com and enter your login credentials.
Create a new survey	<ul style="list-style-type: none"> - To get started, click the green button at the top right which says +Create Project. - You can create a simple survey from scratch by selecting Blank Survey Project. - Be sure to name your survey something clear and descriptive. Designate a folder if desired. - Click Create Project.
Add and Modify questions	<ul style="list-style-type: none"> - Click the green button toward the bottom which says + Create a New Question. - Multiple Choice is the default question type, but you can change this using the green button on the right-hand toolbar under Change Question Type. - To add a new survey "page," click Add Page Break on the right hand toolbar, under "Actions." - Changes will automatically be saved. CTRL+Z will undo any changes you've made.
Handy question options (advanced)	<ul style="list-style-type: none"> - If you want to require that participants answer a particular question, you can designate a question as a Forced Response, under Validation Options on the right hand toolbar. However, be mindful of the ethical implications of forcing certain responses. - If you want to show different follow-up questions based on a participant's response (e.g., Biology majors get asked a different set of questions than English majors), explore Add Display Logic.
Preview your survey	<ul style="list-style-type: none"> - To experience the survey as your respondent would, click the blue Preview Survey tab, top right. - As you are modifying questions and adding pages, it is helpful to preview the survey frequently. - To change the colors, font size, and design features of the survey, explore the Look & Feel tab.
Activate & Distribute your survey	<ul style="list-style-type: none"> - When your survey is complete, click on the Distributions tab at the top left. - You have multiple distribution options. The simplest way to create an anonymous link that can be copied and pasted into emails or webpages is to click Web, then Use Anonymous Link. - You can also email your survey directly through Qualtrics, under Distributions, then Emails. - Once you schedule the email distribution, it will be saved under Distributions, then Emails. From here, you can also +Schedule Reminder for non-respondents or +Schedule Thank You Message. - If you have names and emails in an Excel file, you can upload them through Contacts then +Create Contact List. Be sure the top row of the file has column headers (e.g. "Email"), and <i>Save As</i> a .csv.
View, Analyze, and Download your results	<p>Below are some initial options for view results within Qualtrics:</p> <ul style="list-style-type: none"> - To quickly view <u>individual responses</u>, click Data & Analysis -> Data. You can see individual responses on the screen, or you can download by selecting a participant -> Actions-> Export to PDF.

	<p>- To view <u>summary results for all/select questions</u>, click Reports -> Results. Qualtrics will automatically graph and analyze the results of each question. You can customize graphs/charts by clicking on them and using the right hand toolbar. You can export as images under Page Options.</p> <p>- To <u>download graphs and tables for all/select questions</u>, you have two options:</p> <ol style="list-style-type: none"> 1. Click the Share Reports button and choose your preferred format (e.g., Word, PPT) 2. Click Reports -> +Create New Report. Here you can design your report within Qualtrics, much like a Word document, by adding headings, images, text, question wording, graphs, and statistics. <p>- To <u>download data to Excel or SPSS</u>, click Data & Analysis -> Data -> Export & Import -> Export Data -> Download Data Table. Then choose your file format (CSV opens in Excel).</p>
<p>Close, Re-Activate, Share, or Delete your survey.</p> <p>Manage Folders</p>	<p>Most survey management features will be found on the Projects main page by clicking on the dropdown arrow on the far right of a project. You can manage Folders here, too: just drag a survey between folders.</p> <p>- To close an active survey, click Close on the dropdown menu. This does not delete the survey, it only closes it to new responses.</p> <p>- To re-open a closed survey, click Activate on the dropdown menu.</p> <p>- To delete a survey project, click Delete Project on the dropdown menu.</p> <p>- To share a survey, click Share Project on the dropdown menu. Enter the email address <i>of the Qualtrics user</i> with whom you'd like to share access. You can control viewing and editing rights here.</p>
<p>Protecting your data</p>	<p>- The Survey Coordinating Committee recommends downloading and saving all data to the G\drive for permanent storage. Please delete data from Qualtrics once it is finalized and downloaded: Data & Analysis -> Tools -> Delete</p> <p>- Always be mindful of who has access to your data, especially for data that may include identifying information. Shared accounts, especially in offices with rotating students/staff, need precautions.</p> <p>- NEVER include identifying information in reports unless you have explicit consent to do so from your respondents.</p>